Banking Sales Management Training Course

Professional Development Training Course Outline

Category	Banking Institute	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s highly competitive and rapidly evolving financial landscape, Banking Sales Management has become a critical driver of profitability, customer retention, and sustainable growth. Banking Sales Management Training Course is designed to equip banking professionals with advanced sales strategies, digital banking sales techniques, customer-centric selling models, and data-driven decision-making skills. Participants will gain insights into sales performance optimization, relationship management, cross-selling and up-selling frameworks, and omnichannel sales transformation, enabling them to stay ahead in the era of fintech disruption and evolving customer expectations.

The course integrates modern sales leadership practices, CRM analytics, behavioral selling techniques, and regulatory-compliant sales approaches to ensure both performance and integrity. With a strong focus on practical case studies, real-world banking scenarios, and emerging trends such as AI in sales, digital onboarding, and personalized banking experiences, this program empowers participants to build high-performing sales teams and deliver measurable results. It is ideal for professionals aiming to enhance sales productivity, customer lifetime value (CLV), and revenue growth in retail and corporate banking environments.

Programme Curriculum

Banking Sales Management Training Course

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Course Duration

5 days

Course Objectives

By the end of this training, participants will be able to:

1. Master modern banking sales strategies for revenue growth
2. Apply customer-centric selling techniques to improve client engagement
3. Utilize CRM systems and sales analytics for performance tracking
4. Implement cross-selling and up-selling frameworks effectively
5. Enhance digital banking sales capabilities and omnichannel strategies
6. Develop high-performing sales teams through leadership skills
7. Improve customer retention and loyalty programs
8. Apply behavioral and consultative selling techniques
9. Align sales practices with banking compliance and regulatory standards
10. Optimize sales pipeline management and forecasting accuracy
11. Leverage data-driven decision-making in sales management
12. Drive customer acquisition strategies using fintech solutions
13. Measure and improve sales KPIs and performance metrics

Target Audience

1. Banking Sales Managers
2. Relationship Managers
3. Branch Managers
4. Business Development Officers
5. Retail Banking Professionals
6. Corporate Banking Executives
7. Customer Experience Managers
8. Financial Services Consultants

Course Modules

Module 1: Fundamentals of Banking Sales Management

- Overview of banking sales ecosystem
- Key sales models in banking
- Sales lifecycle management
- Role of sales in banking profitability
- Case Study: Transforming branch sales performance in retail banking

Module 2: Customer-Centric Selling & Relationship Management

- Understanding customer needs and segmentation
- Building long-term client relationships
- Customer journey mapping
- Personalization in banking services
- Case Study: Enhancing customer loyalty through relationship banking

Module 3: Digital Banking Sales & Omnichannel Strategies

- Digital transformation in banking sales
- Omnichannel customer engagement
- Mobile and online banking sales techniques
- Social selling and digital outreach
- Case Study: Increasing sales via digital banking platforms

Module 4: Sales Performance Management & KPIs

- Sales targets and KPI setting
- Performance monitoring tools
- Sales dashboards and analytics
- Incentive and compensation structures
- Case Study: Improving sales productivity using KPI frameworks

Module 5: Cross-Selling, Up-Selling & Product Bundling

- Identifying cross-sell opportunities
- Product bundling strategies
- Increasing customer lifetime value (CLV)
- Sales scripting techniques
- Case Study: Boosting revenue through bundled financial products

Module 6: Leadership in Banking Sales

- Sales leadership and team motivation
- Coaching and mentoring sales teams
- Managing sales performance
- Building a sales-driven culture
- Case Study: Leading high-performing banking sales teams

Module 7: Compliance, Ethics & Risk in Sales

- Regulatory frameworks in banking sales
- Ethical selling practices
- Risk management in sales processes
- Avoiding mis-selling and fraud
- Case Study: Managing compliance risks in sales operations

Module 8: Data-Driven Sales & Future Trends

- Using data analytics in sales decisions
- AI and automation in banking sales
- Predictive sales modeling
- Future trends in financial services sales

- Case Study: Leveraging AI tools to improve sales conversion rates

Training Methodology

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com